

Office of the Chief Information Officer FM/EUS Statement of Work		
COTR	Task Title	Task Manager
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1. BACKGROUND

The US Patent and Trademark Office (PTO) is currently making many changes to the information system infrastructure. These changes include the introduction of new, more complex technology. At the same time, PTO has to continue to operate and maintain some old and temperamental technology.

The purpose of this task is to allow the Office of the Chief Information Officer (OCIO) to more quickly resolve any problems that occur with either the new or the old technology assets.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support Monday through Friday, 6:30 AM to 6 PM (excluding federal holidays).
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% “re-opened” and “unsatisfactory” ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
5. If Contractor performs a site visit, Contractor shall always leave a completed work service form with the customer. If the customer is at the site, Contractor shall notify the customer before leaving the site.
6. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if three (3) attempts to contact a customer over a 3-day period do not produce a response from the customer.
7. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.

8. Contractor staff shall be Microsoft Certified Systems Engineers. They shall also possess a background in either systems programming, network engineering, or security administration
9. The Contractor shall follow-up on any problems where OCIO has failed to meet its service level commitments by (one) 1 day or more. This follow-up shall include, but not necessarily be limited to, the following:
 - contacting the problem assignee to confirm that the assignee is aware of the problem
 - contacting other groups or individuals, as called for in the Operational Support Plans, to work on aspects of the problem
 - providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task Managers
 - notifying the Task Managers when a service level commitment has been missed
 - assisting in problem recovery when directed to do so by the Task Managers
 - updating the Task Managers, as new information becomes available, on the status of the problems
 - ensuring that the Help Desk or the problem assignee is notifying the customer of any progress in resolving the problem
 - ensuring that within one (1) hour of the problem being resolved, either the Help Desk or the problem assignee has notified the customer
 - notifying the Task Managers, within two (2) hours, of any problems that will require a Root Cause Analysis
 - notifying the Task Managers, within one (1) day of problem resolution or circumvention, of problems that may be application system deficiencies
 - documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future
10. The Contractor shall review all draft Operational Support Plans for accuracy and completeness. The Contractor shall provide their written comments to the Task Managers within six (6) working days of receiving a plan.
11. The Contractor shall verify the continued accuracy and completeness of all existing Operational Support Plans at least once every nine (9) months. The Contractor shall provide their written comments to the Task Managers on all recently reviewed plans by the fifth of each month.
12. The Contractor shall be responsible for those problems and changes recorded in the OCIO automated problem and change management systems.
13. The Contractor shall analyze new problem records for possible trends. The types of trends may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers but actually impact multiple customers (examples: line outage, router failure). The Contractor shall provide the

Task Managers with written notice of these trends within one (1) hour of identification.

14. The Contractor shall verify successful implementation of changes. The Contractor shall provide the Task Manager, by noon each day, with a list of any changes that weren't successfully implemented the previous day.
15. The Contractor shall assist USPTO in acquisition of expertise in the Knowledge Pak software; guide the development of standards and naming conventions for PTO Knowledge Paks and document the same. The contractor shall mentor and guide the Knowledge Team in developing and deploying additional new Knowledge Paks. The Contractor shall work on the concurrent development of up to six (6) new Knowledge Paks. The Contractor shall ensure that new Knowledge Paks are ready for deployments within two (2) months of beginning development. The Contractor shall update existing Knowledge Paks in accordance with USPTO procedures.
16. Contractor shall provide on-site support to 60 (sixty) Trademark Work at Home participants. Contractor shall provide the support in accordance to the terms of the Trademark Work at Home Service Level Agreement.
17. From August 8, 2000 through August 25, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 22 (twenty-two) participants. The deployments which take place from August 8, 2000 through August 11, 2000 shall be scheduled for the rate of up to 2 (two) per day. The deployments which take place from August 14, 2000 through August 25, 2000 shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor has been provided with a deployment schedule, including the customers' names, addresses, and travel directions.
18. From September 5, 2000 through September 15, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 25 (twenty-five) participants. The deployments shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor will be provided with a deployment schedule, including the customers' names, addresses, and travel directions. The Contractor shall also provide on-site support as needed to all Trademark Work at Home participants.
19. From December 4,, 2000 through December 15, 2000, the Contractor shall configure and deploy Trademark Work at Home hardware to up to 30 (thirty) participants. The deployments shall be scheduled for the rate of up to 4 (four) per day. The participants reside, on average, within 30 (thirty) miles of USPTO's campus. When deployments are made to multiple participants on a single day, those participants will reside, on average, within 10 miles of one another. The Contractor will be provided with a

deployment schedule, including the customers' names, addresses, and travel directions. The Contractor shall also provide on-site support as needed to all Trademark Work at Home participants.

20. The Contractor shall provide technical support for the Patents Software Baseline.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish workspace, telephone systems, and all pertinent documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor-leased facilities in Crystal City, VA and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Managers (electronic form required).

Deliverable	Schedule
Synopsis of all work performed during a week	by close of business each Monday
Comments on new Operational Support Plans	within six (6) working days of plan receipt
Comments on review of existing Operational Support Plans	by 5 th of each month (9-month cycle for each plan)

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.